



DATA TRANSFER

WebGrants User Guide

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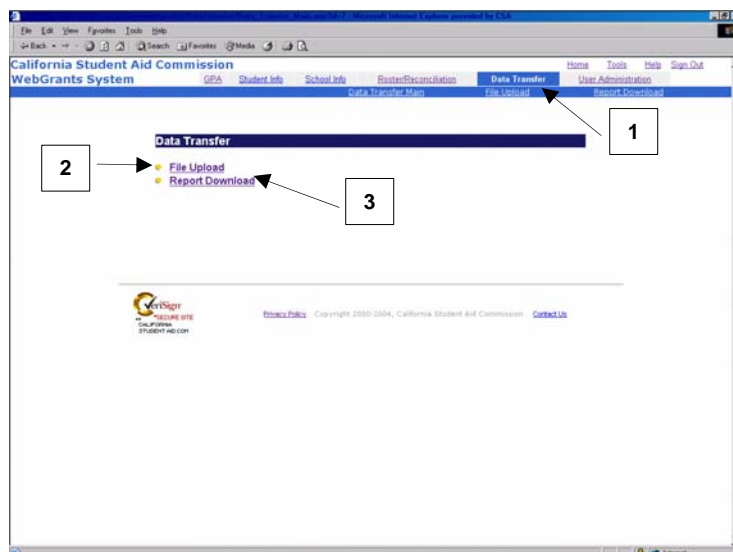
DATA TRANSFER MAIN PAGE

Purpose

The Data Transfer area of WebGrants allows schools to upload files from their PC to the CSAC server as well as view and download a variety of monthly and weekly reports used for Cal Grant processing.

Page Elements

1. **Data Transfer Navigation Bar** This shortcut navigation bar contains links to all pages within the Data Transfer area of WebGrants.
2. **File Upload** Link to the File Upload Page where users can upload files from their PC to the Grant Delivery System (see page 3).
3. **Report Download** Link to the Report Download Page where users can view and download various reports (see page 4).



Access

This page can be accessed by clicking on the [Data Transfer](#) link in the Options box on the WebGrants Home Page or by clicking on the [Data Transfer](#) link in the WebGrants Navigation Bar located in the upper right of all WebGrants pages.

Page Functions

Navigate to all other pages within the Data Transfer Area of WebGrants

The main page of each WebGrants area contains links to the pages included in that area. In addition, each area within WebGrants has its own submenu navigation bar that is located in the blue bar directly under the WebGrants Navigation Bar. This submenu navigation bar allows the user to move from page to page within the same area of WebGrants without continually going through the Main Page of each area.

Click the [File Upload](#) link to view the File Upload Page (see page 3).

OR

Click the [Report Download](#) link to view the Report Download Page (see page 4).

OR

Click a link on the Data Transfer navigation bar to view the indicated page.

File Upload Page

Purpose

Uploading is a simple process participating schools use to transmit specifically formatted data files containing payment and status change transactions to the Commission for batch processing. Data files being prepared for transmission to the Commission must be saved prior to selection and transmitted in a text file format with a ".txt" file extension.

Page Elements

1. **Record Display Criteria Bar** The fields on this blue bar allow users to select which types of reports to display.

- **School ID** Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.
- **Type of Upload** Users identify the type of file to be uploaded by selecting a file type from this drop down list. Refer to Appendix A for information on data file layout specifications for each of the following data file upload types.

- **Award Status Extract:** List of students for which an award status extract is requested (see page 5).
 - **EL Verification:** Upload verification of listed students' education level as of the date the first payment was reported to the Commission.
 - **Grant Roster:** Payment transactions updates for students listed on the school's grant roster.
 - **School Change Request:** In order to add a Cal Grant recipient who is/will be attending your school to your Cal Grant roster, a school change must be completed. Requesting a school change for an individual student can be completed on the Display Roster page (see User Guide: Roster). Requests for school changes for multiple Cal Grant recipients can be submitted to CSAC in a data file through the file upload page.
2. **Academic Year** Use this field to associate a specific academic year with the file located in the File Location field directly adjacent to it.
3. **File Location Fields** file path location of the file to upload.
4. **<Browse> Button** Clicking here allows the user to search their PC or network drive for a file to upload.
5. **<Upload> Button** After entering a file to upload in at least one of the File Location Fields, this button must be clicked to upload the file.

File Upload Page

Access

The File Upload Page can be accessed by clicking the [File Upload](#) link on the Data Transfer Main Page (see page 1) or by clicking the [File Upload](#) link on the blue submenu navigation bar.

File Record Layout Specifications

To facilitate the exchange of electronic files between the Commission and schools, standard header, detail and upload file layouts have been established for each type of file. File layout specifications for each file type can be viewed by clicking on the appropriate [File Specification](#) link on the WebGrants Help Center page.

Page Functions

Upload a Data File to the Commission

1. Insure that the School ID field displays the school ID for which to upload a file.
2. Select the type of file to be uploaded from the Type of File drop down list. Only one type of file may be uploaded at the same time.
3. If the file path of the .txt or .xml document to upload is known, type it into the **File Location** field.
If the file path is unknown, click the <Browse> button to locate and select the file from your PC's hard drive or a network drive (see figure 3-1). Once selected, click the <OK> button.
 - The **File Location** field will automatically be populated with the file path.
4. Click the <Upload> button
 - Processing time for the upload depends on the size of the file. Turning gears will appear on the page while the upload is in process.
 - When the upload is complete, the message “___ number of files have been successfully uploaded” will appear.

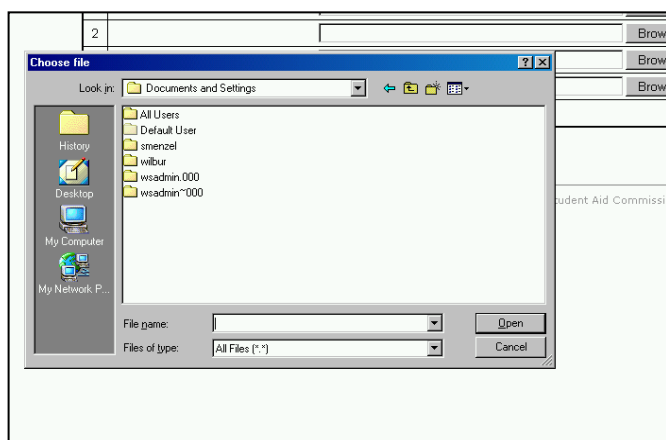


Figure 3-1: Browse pop-up window

Report Download Page

Purpose

The Report Download Page gives users access to all monthly and weekly Commission generated reports used for Cal Grant processing and reconciliation.

Page Elements

1. Record Display Criteria Bar The fields on this blue bar allow users to select which types of reports to display.

- **School ID** Users select the school to display by selecting the 8-digit school code from this drop down list. Only the schools to which the user is authorized will be displayed.
- **Academic Year** Users select the academic year for which to display reports by selecting a year from the drop down box.
- **Report** Users select the type of report to display by selecting a report type from the drop down box. Selecting "All" will display all available types.

Report Download for UNIV OF CA - DAVIS

To download or display a report or data file click on the Retrieve File button.

All data columns can be sorted either ascending or descending order by clicking on the blue column headings.

To compare two roster files, select Grant Roster for Report and Data File for Media Type.

To create a Roster data file that includes the indicators for students new or changed from a previous data file, select one file recent file should be selected in the New File column and the older file in the Old File column. Then click Compare Files to produce the data file and report.

To create a Roster data file and report that lists the students who have been transferred from your roster to another school, the most recent file should be selected in the New File column and the older file in the Old File column. Then click Removed From Roster to produce the data file and report.

School ID = 10131301 Academic Year = 2004-2005 Month = November Media Type = Data File

Report = Grant Roster

Report Date	Description	Media Type	Month	New File	Old File	Retrieve File
23-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
19-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
15-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
12-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
10-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
09-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
08-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
05-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
04-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
04-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
03-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File
02-NOV-04	Grant Roster	Data File	NOV	✓	✓	Retrieve File

Compare Files Removed From Roster

- **Accept/Reject** A weekly report generated to inform schools of the accepted and rejected status of that week's reported payment transactions.
- **Automatic Leave** A monthly report generated from approximately July until December that lists Cal Grant recipients who have had their awards renewed for the next academic year, but have not had all terms of the previous academic year accounted for. WebGrants users should work to insure that student payment transactions are posted for all applicable terms of the previous academic year.
- **Award Status Extract - Awarded** One of two reports generated when schools upload an Award Status File which requests award status information for the requested list of students. This report, containing the students who were awarded a Cal Grant, is available only as a data file.
- **Award Status Extract - Non Awarded** One of two reports generated when schools upload an Award Status File which requests award status information for the requested list of students. This report, which provides a list of social security numbers that do not match the a Cal Grant recipient, is available only as a data file.
- **EL Accept/Reject** A weekly report generated to inform schools of the accepted and rejected status of that week's reported EL transactions.
- **EL Upload Summary** A report generated when schools upload an EL Verification data file (see page 2). This report lists any students for which EL verification was included in the uploaded data file but that cannot be processed due to insufficient data, error in layout, etc. It also includes a total number of records successfully uploaded, and the number of records that could not be processed.
- **Education Level Verification** A data file that lists new Cal Grant recipients whose Education Level requires verification. Schools should verify the educational level of each recipient on the report and may upload the results through the file upload process (see page 3).
- **Cal C Supplement Recipient** An annual report containing a list of Cal Grant C candidates who may be attending a particular school and have been sent a supplemental application. Awarding of a Cal Grant C is dependent on the applicant completing and returning the supplemental application.
- **GPA Summary** A cumulative report produced each time GPA records are processed that lists all students with GPAs successfully submitted by a particular school for the current award cycle.

Report Download Page

- **Grant Roster** A weekly report that contains the comprehensive list of Cal Grant recipients and their grant information for a particular school and a particular academic year. Changes to the grant roster can be made through the WebGrants online roster or schools can submit grant roster changes through the file upload process (see page 4). Report Download Page
 - **Monthly Payment Activity Report** A monthly report that provides schools with detail and summary information pertaining to the institution's term advances, accepted and reconciled payment transactions, and Cal Grant fund balances.
 - **Other** If the Commission runs any special system queries or reports for one or more schools, these would be located under the "Other" category of reports.
 - **School Change Upload** A report generated when schools upload a School Change Upload data file (see page 2). This report lists any students for which a school change was requested via the uploaded data file for which insufficient data was provided. It also includes the total number of records successfully uploaded, and the number of records that could not be processed.
 - **Unable to Determine Renewal Eligibility Report** A monthly report generated from approximately July until December. This report lists all Cal Grants recipients that the Commission believes were enrolled at the school for the prior year for whom at least one term has yet to be accounted for by the reporting of a payment, a leave of absence or another transaction. This report is informational only and is not to be returned to the Commission through the file upload process.
 - **Unclaimed Award** A list of Cal Grant recipients who have had no payments reported during the selected academic year at any of the six participating California school choices indicated on the student's ISIR. This report will be generated periodically throughout the year beginning with the October month-end cycle of the award year and through final reconciliation for that year. Each time the report is created it will overwrite the previous report. Recipients with a Cal Grant award issued for the September cycle will only appear on the reports for Community Colleges. Recipients of Transfer Entitlement awards will only appear on schools with Bachelor degree programs.
 - *Month* Users can display reports that were created during a particular month by selecting a month from this drop down box. Selecting "All" will display reports for every month in the current academic year.
 - *Media Type* WebGrants reports are created in two different file types. Users can filter reports by their output type by selecting a media type from the drop down box. Selecting "All" will display all available media types.
 - *Data file* The report data is formatted to facilitate download into an external database program.
 - *Report* The report data is formatted to facilitate on screen viewing or printing.
2. **Report Display Table** Displays a list of reports that match the selection criteria chosen in the Search Bar.
 3. **Old File/New File Columns** When comparing two grant rosters using the **<Compare Files>** and **<Removed from Roster>** buttons, Users can select which grant rosters to compare by specifying them here. The Old File should always be the earlier (by date) roster. These columns will only be displayed when the function for comparing files is available.
 4. **<Retrieve Files> Button** Click here to view and/or download the report listed on the corresponding line.
 5. **<Compare Files> Button** Users can click here to view and/or download a new data file that is a result of a comparison between two grant roster data files. The resulting data file will indicate students new to the roster as well as students whose grant records have changed.
 6. **<Removed from Roster> Button** Users can click here to view and/or download a report that compares two grant roster data files. The resulting data file/report is filtered to only include students formally on the User's roster that have been transferred to another school's roster.

Report Download Page

Access

The Report Download Page can be accessed by clicking the [Report Download](#) link on the Data Transfer Main Page (see page 1) or by clicking the [Report Download](#) link on the blue submenu navigation bar.

File Compare Features

Although the online roster will always contain the most up-to-date information, users may find it useful to identify the changes that occur from one grant roster to another. Using the file compare features, users can select an Old File and New File to be compared against one another. Comparing grant rosters using the **<Compare Files>** button will result in a new data file that will display all records on the New File with the addition of a * symbol next to the student records that have been added to the roster since the Old File was created and an @ next to student records that have had a change to the payment data since the Old File was created. Changes to the roster section in which the student is located, annual unmet need amount, forecasted award year eligibility, and annual award amount will result in an @ symbol next to the student record. Likewise, the **<Removed from Roster>** button will compare the indicated Old File and New File and return a list of students formally on the User's roster that have been transferred to another school's roster.

Page Functions

View a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. To further filter the list of reports to display, select a report, month, and/or media type from the corresponding fields (this step is not required).
4. Click the **<Go!>** button
 - The selected reports will populate the **Report Display Table**.
5. Click the **<Retrieve File>** button that corresponds to the report you wish to view.
 - A separate pop-up window will be displayed.
6. Click the [Display/Download](#) link to view the report.
 - The selected report will be displayed in a separate pop-up window.
4. Click the **<Retrieve File>** button that corresponds to the report you wish to view.
 - A separate pop-up window will be displayed.
5. Click the [Display/Download](#) link to view the report.
 - The selected report will be displayed in a separate pop-up window.

Download a Report

1. Select the school code of the school for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. To further filter the list of reports to display, select a report, month, and media type to from the corresponding fields (this step is not required).
4. Click the **<Go!>** button
 - The selected reports will populate the **Report Display Table**.
5. Click the **<Retrieve File>** button that corresponds to the report you wish to download.
 - A separate pop-up window will be displayed.
6. Click the [Display/Download](#) link **with the right mouse button**.
 - A shortcut menu will appear next the mouse cursor
7. Select the "Save Target As..." option from the shortcut menu (see figure 7-1)
 - The "Save As" pop-up box will appear (see figure 7-2)
8. Select a location on your PC or network drive to which the report can be saved, name the report something that is meaningful to you, and click the **<Save>** button.

Report Download Page

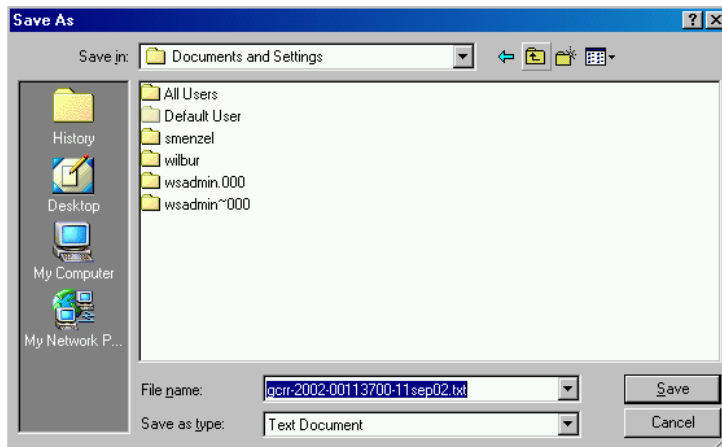


Figure 7-2: "Save As" pop-up box

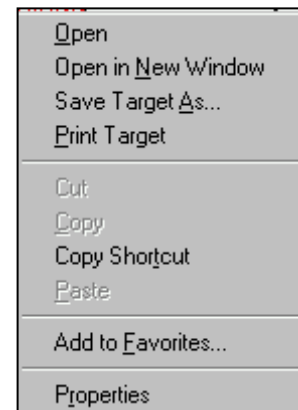


Figure 7-1: Shortcut Menu

Compare Two Roster Data Files Filtering for New or Changed Grant Records

1. Select the school code for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. Select "ALL" from the **Month** drop down list.
4. Select "Grant Roster" from the **Report** drop down list.
5. Select "Data File" from the **Media Type** drop down list.
6. Click the <Go!> button
 - The grant roster data files will populate the **Report Display Table**.
7. Click the button in the **New File** column for the grant roster that is the **more recent** of the two files.
8. Click the button in the **Old File** column for the grant roster that is the **older** of the two files.
9. Click the <Compare Files> button
 - WebGrants make take a few minutes to process the comparison. Once completed, the [Compare Link](#) will appear (see figure 8-1).
10. Click the [Compare Link](#) to view the data file extract in a separate pop-up window.
 - The resulting data file will include an @ next to those records where the payment data has been changed from the **Old File** selected in step 7 and a * next to those records that have been added to the roster since **Old File** was created. Both the @ and * indicators will be located in the space preceding the grant ID number on each student's grant record.

Compare Two Roster Data Files Filtering for Students Transferred to Another School's Roster

1. Select the school code for which to display reports from the **School ID** drop down list.
2. Select the academic year for which to display reports from the **Academic Year** drop down list.
3. Select "ALL" from the **Month** drop down list.
4. Select "Grant Roster" from the **Report** drop down list.
5. Select "Data File" from the **Media Type** drop down list.
6. Click the <Go!> button
 - The grant roster data files will populate the **Report Display Table**.
7. Click the button in the **New File** column of the **Report Display Table** for the grant roster that is the **more recent** of the two files.
8. Click the button in the **Old File** column of the **Report Display Table** for the grant roster that is the **older** of the two files.
9. Click the <Removed from Roster> button
 - WebGrants may take a few minutes to process the comparison. Once completed, the [Data File Link](#) and the [Report Link](#) will appear (see figure 8-2).
10. Click the [Data File Link](#) to view the data file extract in a separate pop-up window or click the [Report Link](#) to view the same extract in a printable report format displayed in a separate pop-up window.
 - The resulting data file and report will include a list of all students formally on the user's roster that have been transferred to another school's roster since the **Old File** selected in step 7 was originally created by CSAC.
 - Please note that the data file format will include payment data, however the report format will include only the student's name, grant ID#, social security number, birthdate and program code.

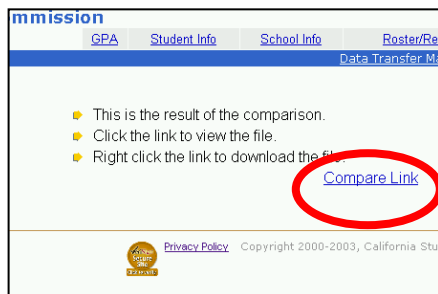


Figure 8-1: [Compare Link](#)

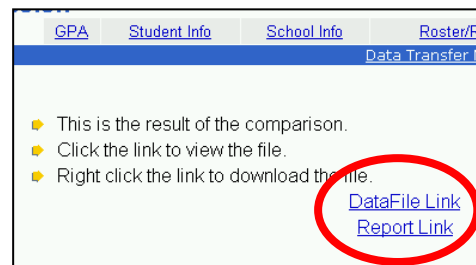


Figure 8-2: [Data File Link](#) and [Report Link](#)